

Job Title: Budget and Financial Planning Analyst

Department: Finance

Immediate Supervisor: Budget and Research Manager

Origination Date:	12/05/2006
Revision Date:	07/01/2012
Job Grade	607
FLSA Status	Exempt

BRIEF DESCRIPTION OF THE JOB:

The Budget and Financial Planning Analyst is responsible for supporting the Finance Department in the areas of system development/implementation, budget, and long-term financial planning. Prepares, analyzes, and coordinates the development of the City’s budget.

ESSENTIAL FUNCTIONS:

This information is intended to be descriptive of the key responsibilities of the position. The following examples do not identify all duties performed by any single incumbent.

Physical Strength Code		Essential Functions
1	S	Provides assistance to the Budget and Research Manager and staff by providing feedback on special projects and proposals, participating in strategic and operational planning, and responding to operational and process inquiries.
2	S	Coordinates monthly and quarterly budget variance reports. Perform monthly data downloads from financial System. Coordinates and provides technical support to the City Department’s staff by resolving budget problems, providing training in the preparation, presentation and monitoring of annual budgets, and other related activities. Acts as a Budget Liaison for various City Departments. Participates in Budget planning sessions and reports on expenditure patterns quarterly. Represents the department at management level meetings, giving presentations, providing information and answering questions as the subject matter expert regarding particular area of assignment.
3	S	Provides analysis of cost of service models and rate studies for various activities. Assists Budget Manager with special studies and cost allocation plans.
4	S	Provides assistance to the Finance Director and Budget and Research Manager by providing feedback on financial forecasting models, budget policy, economic development proposal and various types of trend analysis.
5	S	Provides extensive budgetary oversight, through the requisition process, to ensure that all departments follow financial best practices in utilizing and implementing their operating budgets. This includes extensive interaction with departments to minimize cost overruns and ensure compliance with City policies and procedures.
6	S	Prepares financial schedules for the annual budget document. Coordinates the publication of the Budget book and the Development Trends book for the City. Participates in completion of the City’s annual Capital Improvement Program documents. Conducts team meetings, gathers information and analyzes data.

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JOB REQUIREMENTS:

JOB REQUIREMENTS	
Formal Education / Knowledge	Work requires broad knowledge in a general professional or technical field. Knowledge is normally acquired through four years of college resulting in a Bachelor's degree or equivalent.
Experience	Minimum three years experience in a related field.
Certifications and Other Requirements	None
Reading	Work requires the ability to read Financial research studies, pending legislation, business plans, engineering consultant reports, water/wastewater technical reports, City Council communications, professional publications, request for proposals, organizational policies and procedures, regulatory publications, and technical financial analysis user manuals.
Math	Work requires the ability to work complex problem solving using algebra, present/future value concepts, trend analysis, statistical relationships, capital budgeting, financial formulas, and cost benefits analysis.
Writing	Work requires the ability to write Financial Reports, Memorandums, Council Action Requests, and procedural manuals.
Managerial	Job has no responsibility for the direction or supervision of others but may provide advice/direction to an employee with less experience/skill or tenure.
Policy / Decision Making	Moderate - The employee normally performs the job by following established standard operating procedures and/or policies. There is a choice of the appropriate procedure or policy to apply to duties. More complex work as well as decisions with more significant impacts are typically reviewed prior to being finalized.
Budget Responsibility	Significant - Oversees budget preparation of a program budget. Reviews and approves expenditures of significant budgeted funds for the department or does research and prepares recommendations for city-wide budget expenditures.
Technical Skills	Comprehensive Application - Work requires a comprehensive, practical knowledge of a technical field with use of analytical judgment and decision-making abilities appropriate to the work environment of the organization.
Interpersonal / Human Relations Skills	High - Interactions at this level usually impact the implementation of policies. Contacts may involve interpretation of how policies are implemented and may require discussion and the support of controversial positions or the negotiation of sensitive issues or important presentations. During interactions on policy implementation, contacts may also involve stressful, negative interactions requiring high levels of tact and the ability to respond to aggressive interpersonal interactions.

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Physical Demands

Frequency Code Scale

N = Never	R = Rarely	O = Occasionally	F = Frequently	C = Constantly
Never occurs	Less than 1 hour/week	Up to 1/3 of the time	From 1/3 to 2/3 of the time	2/3 or more of the time

Physical Demand	Frequency Code (Mark only one)	Description: (Check all that apply)	Physical Demand	Frequency Code (Mark only one)	Description: (Check all that apply)
Standing	<input type="checkbox"/> N <input checked="" type="checkbox"/> R <input type="checkbox"/> O <input type="checkbox"/> F <input type="checkbox"/> C	<input checked="" type="checkbox"/> Making presentations <input type="checkbox"/> Observing work site <input type="checkbox"/> Observing work duties <input checked="" type="checkbox"/> Communicating with co-workers	Pushing/ Pulling	<input type="checkbox"/> N <input type="checkbox"/> R <input checked="" type="checkbox"/> O <input type="checkbox"/> F <input type="checkbox"/> C	<input checked="" type="checkbox"/> File drawers <input type="checkbox"/> Equipment <input checked="" type="checkbox"/> Tables and chairs <input type="checkbox"/> Hoses
Fine Dexterity	<input type="checkbox"/> N <input type="checkbox"/> R <input type="checkbox"/> O <input checked="" type="checkbox"/> F <input type="checkbox"/> C	<input checked="" type="checkbox"/> Computer keyboard <input checked="" type="checkbox"/> Telephone keypad <input checked="" type="checkbox"/> Calculator <input type="checkbox"/> Calibrating equipment	Climbing	<input checked="" type="checkbox"/> N <input type="checkbox"/> R <input type="checkbox"/> O <input type="checkbox"/> F <input type="checkbox"/> C	<input type="checkbox"/> Stairs <input type="checkbox"/> Ladders <input type="checkbox"/> Step stools <input type="checkbox"/> Onto equipment
Walking	<input type="checkbox"/> N <input type="checkbox"/> R <input type="checkbox"/> O <input checked="" type="checkbox"/> F <input type="checkbox"/> C	<input checked="" type="checkbox"/> To other departments/offices <input type="checkbox"/> Around work site	Vision	<input type="checkbox"/> N <input type="checkbox"/> R <input type="checkbox"/> O <input checked="" type="checkbox"/> F <input type="checkbox"/> C	<input checked="" type="checkbox"/> Reading <input checked="" type="checkbox"/> Computer screen <input checked="" type="checkbox"/> Driving <input type="checkbox"/> Observing work site
Lifting	<input type="checkbox"/> N <input type="checkbox"/> R <input checked="" type="checkbox"/> O <input type="checkbox"/> F <input type="checkbox"/> C	<input checked="" type="checkbox"/> Supplies <input checked="" type="checkbox"/> Equipment <input checked="" type="checkbox"/> Files	Foot Controls	<input type="checkbox"/> N <input checked="" type="checkbox"/> R <input type="checkbox"/> O <input type="checkbox"/> F <input type="checkbox"/> C	<input type="checkbox"/> Driving <input type="checkbox"/> Operating heavy equipment <input type="checkbox"/> Operating Dictaphone
Carrying	<input type="checkbox"/> N <input type="checkbox"/> R <input checked="" type="checkbox"/> O <input type="checkbox"/> F <input type="checkbox"/> C	<input checked="" type="checkbox"/> Supplies <input checked="" type="checkbox"/> Equipment <input checked="" type="checkbox"/> Files	Balancing	<input type="checkbox"/> N <input checked="" type="checkbox"/> R <input type="checkbox"/> O <input type="checkbox"/> F <input type="checkbox"/> C	<input type="checkbox"/> On ladders <input type="checkbox"/> On equipment <input type="checkbox"/> On step stools
Sitting	<input type="checkbox"/> N <input type="checkbox"/> R <input type="checkbox"/> O <input checked="" type="checkbox"/> F <input type="checkbox"/> C	<input checked="" type="checkbox"/> Desk work <input checked="" type="checkbox"/> Meetings <input checked="" type="checkbox"/> Driving	Bending	<input type="checkbox"/> N <input type="checkbox"/> R <input checked="" type="checkbox"/> O <input type="checkbox"/> F <input type="checkbox"/> C	<input checked="" type="checkbox"/> Filing in lower drawers <input checked="" type="checkbox"/> Retrieving items from lower shelves/ground <input type="checkbox"/> Making repairs
Reaching	<input type="checkbox"/> N <input type="checkbox"/> R <input checked="" type="checkbox"/> O <input type="checkbox"/> F <input type="checkbox"/> C	<input checked="" type="checkbox"/> For supplies <input checked="" type="checkbox"/> For files	Crouching	<input type="checkbox"/> N <input checked="" type="checkbox"/> R <input type="checkbox"/> O <input type="checkbox"/> F <input type="checkbox"/> C	<input type="checkbox"/> Filing in lower drawers <input type="checkbox"/> Retrieving items from lower shelves/ground
Handling	<input type="checkbox"/> N <input type="checkbox"/> R <input checked="" type="checkbox"/> O <input type="checkbox"/> F <input type="checkbox"/> C	<input checked="" type="checkbox"/> Paperwork <input type="checkbox"/> Monies	Hearing	<input type="checkbox"/> N <input type="checkbox"/> R <input type="checkbox"/> O <input checked="" type="checkbox"/> F <input type="checkbox"/> C	<input checked="" type="checkbox"/> Communicating via telephone/radio, to co-workers/public <input type="checkbox"/> Listening to equipment
Kneeling	<input type="checkbox"/> N <input checked="" type="checkbox"/> R <input type="checkbox"/> O <input type="checkbox"/> F <input type="checkbox"/> C	<input type="checkbox"/> Filing in lower drawers <input type="checkbox"/> Retrieving items from lower shelves/ground	Twisting	<input type="checkbox"/> N <input type="checkbox"/> R <input checked="" type="checkbox"/> O <input type="checkbox"/> F <input type="checkbox"/> C	<input checked="" type="checkbox"/> From computer to telephone <input checked="" type="checkbox"/> Getting inside vehicle
Crawling	<input type="checkbox"/> N <input checked="" type="checkbox"/> R <input type="checkbox"/> O <input type="checkbox"/> F <input type="checkbox"/> C	<input type="checkbox"/> Under equipment <input type="checkbox"/> Inside attics/pipes/ditches	Talking	<input type="checkbox"/> N <input type="checkbox"/> R <input type="checkbox"/> O <input checked="" type="checkbox"/> F <input type="checkbox"/> C	<input checked="" type="checkbox"/> Communicating via telephone/radio, to co-workers/public
Other		(Explain)			

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Physical Demands (continued)

Machines, Tools, Equipment and Work Aids:

Calculator, phone, copier.

Computer Equipment and Software:

Computer, printer, Microsoft Office software

Environmental Factors:

Environmental Conditions	Never	Seasonally	Several Times Per Month	Several Times Per Week	Daily
Extreme temperature (heat, cold, extreme temp. changes from outside work)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wetness and/or humidity (bodily discomfort from moisture)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Respiratory hazards (fumes, gases, chemicals, dust and dirt)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Noise and vibration (sufficient to cause hearing loss)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical hazards (high voltage, dangerous machinery, aggressive prisoners, patients – <u>not</u> customers)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Health and Safety Conditions:

Health and Safety Conditions	N = Never Never occurs	R = Rarely Less than 1 hour per week	O = Occasionally 1/3 or more of the time	F = Frequently From 1/3 to 2/3 of the time	C = Constantly 2/3 or more of the time
Mechanical hazards	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Chemical hazards	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Electrical hazards	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fire hazards	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Explosives	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communicable diseases	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical danger or abuse	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Primary Work Location:

- Office Environment
- Warehouse
- Shop
- Vehicle
- Recreation Centers/Neighborhood Centers
- Outdoors
- Other (Specify)

Protective Equipment Required:

N/A

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Job Demands

Overall Strength Demands:

Overall Strength Demands	
<input checked="" type="checkbox"/> Sedentary	Exerting up to 10 pounds occasionally or negligible weights frequently; sitting most of the time.
<input type="checkbox"/> Light	Exerting up to 20 pounds occasionally, 10 pounds frequently, or negligible amounts constantly <u>AND/OR</u> walking or standing to a significant degree.
<input type="checkbox"/> Medium	Exerting 20-50 pounds occasionally, 10-25 pounds frequently, or up to 10 pounds constantly.
<input type="checkbox"/> Heavy	Exerting 50-100 pounds occasionally, 25-50 pounds frequently, or from 10 up to 20 pounds constantly.
<input type="checkbox"/> Very Heavy	Exerting over 100 pounds occasionally, 50-100 pounds frequently, or from 20 up to 50 pounds constantly.

Non-physical Demands:

Non-physical Demands	Frequently	Occasionally	Rarely	Never
Time Pressures	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Emergency Situations	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Frequent Change of Tasks	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Irregular Schedule/Overtime	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Performing Multiple Tasks Simultaneously	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Working Closely with Others as Part of a Team	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tedious or Exacting Work	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Noisy/Distracting Environment	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (Describe below.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

EXPECTED BEHAVIOR:

Staff – Expected Behavior

The employee is expected to embrace, support, and promote the City’s values, beliefs, and culture Which include but are not limited to the following:

- Be positive. Do not participate in gossip
- Maintain confidentiality
- Walk the talk – uphold and live the Goodyear culture
- Encourage positive feedback
- Be accountable – submit responses to all requests for information by due date and meet deadlines
- Support a learning culture
- Be on time for all meetings
- Create and implement ethical standards for your worksite

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- Be fiscally responsible
- Support the City's values and mission
- Let common sense prevail
- Be visionary – anticipate issues
- Support organizational change
- Establish and maintain positive and effective working relationships with co-workers, supervisors, subordinates, contractors and vendors
- Understand City policies and procedures, make rational decisions/recommendations in accordance with established policy.
- Work in a safe manner and report unsafe activities and conditions. Follow the City-wide safety policy and everyone's responsibility. Make it a critical part of the day to day operations.
- Foster teamwork and actively participate on teams and in City activities
- Lead by example
- Provide outstanding customer service to internal and external customers

These traits are not basic job requirements but are expected behavior. Other duties and responsibilities will be performed as assigned.

SIGNATURES—REVIEW AND COMMENT:

I have reviewed this job analysis and its attachments and find it to be an accurate description of the demands of this job.

Signature of Employee

Date

Job Title of Supervisor

Signature of Supervisor

Date

Job Title of Department Director

Signature of Department Director

Date

Comments: _____

The above statements are intended to describe the general nature and level of work being performed by individuals assigned to this job. They are not intended to be an exhaustive list of all responsibilities, duties, and skills required of personnel so classified in this position. This job description is subject to change as the needs and requirements of the job change.